

EPA United States Environmental Protection Agency Washington, DC 20460 Work Assignment						Work Assignment Number 3-57				
						<input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:				
Contract Number EP-W-10-002			Contract Period 11/19/2009 To 09/19/2014 Base Option Period Number 3			Title of Work Assignment/SF Site Name Supp for Lean Events for EPA				
Contractor INDUSTRIAL ECONOMICS, INCORPORATED				Specify Section and paragraph of Contract SOW Element 4, Pg. 13						
Purpose <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval				Period of Performance From 09/20/2012 To 09/19/2013						
Comments: The purpose of this action is to initiate Work Assignment 3-57. The contractor shall provide a work plan and budget estimate in accordance with the contract.										
<input type="checkbox"/> Superfund				Accounting and Appropriations Data				<input checked="" type="checkbox"/> Non-Superfund		
SFO (Max 2) <input type="checkbox"/>		Note: To report additional accounting and appropriations data use EPA Form # 900-89A.								
Line	DCN (Max 5)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										
Authorized Work Assignment Ceiling										
Contract Period: 11/19/2009 To 09/19/2014 Cost/Fee: LOE:										
This Action:										
Total										
Work Plan / Cost Estimate Approvals										
Contractor W/P Dated: Cost/Fee: LOE:										
Cumulative Approved: Cost/Fee: LOE:										
Work Assignment Manager Name Scott Bowles _____ (Signature) (Date)						Branch/Mail Code: Phone Number 202-566-2208 FAX Number:				
Project Officer Name Cheryl R. Brown _____ (Signature) (Date)						Branch/Mail Code: Phone Number: 202-566-0940 FAX Number:				
Other Agency Official Name _____ (Signature) (Date)						Branch/Mail Code: Phone Number: FAX Number:				
Contracting Official Name Stefan Martinyan _____ (Signature) (Date)						Branch/Mail Code: Phone Number: 202-564-1987 FAX Number:				

**WORK ASSIGNMENT
Statement of Work (SOW)**

Title: Lean Event and Documentation Support

Contractor: IEc

Contract No.: EP-W-10-002

Work Assignment Number: 3-57

Estimated Period of Performance: Date of issuance to Nov. 19, 2013

Estimated Level of Effort: 381 hours

Key Environmental Protection Agency (EPA) Personnel:

Work Assignment Contracting Officer's Representative (WA COR):

Scott Bowles

Office of Policy/OSEM
202-566-2208

Contract Level COR:

Cheryl R. Brown
Office of Policy (1805T)
202/566-0940
202/566-3001 (fax)

Background and Purpose:

The Office of Strategic Environmental Management (OSEM) helps EPA and others make the strategic policy and governance changes necessary to meet the Agency's goals now and in the future through analysis of emerging issues and strategic management practices, including program analysis and program evaluation.

Since 2005, OSEM has been providing support to, and has been working with, State environmental agencies on the use of business process improvement methods such as Lean and Six Sigma in a new and innovative way to drastically improve permitting and administrative. Within a few months of implementation of the business process method, States drastically reduced permit application backlogs, reduced lead times for permit reviews by more than 50 percent and made more staff time available for "mission critical" work. This was done while improving staff morale and increasing the transparency of the processes to stakeholders, *without* sacrificing environmental protection goals or reducing value-added permit review time.

EPA's Office of Strategic Environmental Management has provided support to the States and other EPA offices and regions to broaden the innovative use of Lean and Six Sigma, by developing several cutting edge Lean government documents. Flagship documents, produced in 2006 and 2007 respectively, include "Working Smart for Environmental Protection – Improving State Agency Processes with lean and Six Sigma," and "Lean in Government - A Practical Guide to Implementing Successful Lean initiatives at Environmental Agencies," also known as "The Lean Starter Kit".

Both documents are posted on the EPA lean web site and have been distributed to all EPA Senior Executive Service (SES) managers, State Environmental Commissioners, and many other federal agencies. They have been used by many States, EPA offices and other federal offices.

EPA provides a wealth of information about lean government on the EPA Lean web site (located at www.epa.gov/lean), including EPA and State case studies, Lean Fact Sheet, Lean in Air Permitting Guide, and many other resources.

The purpose of this work assignment is to support broader scale application of Administrative Lean and Lean Process Improvement tools and techniques, also known as "Lean Government", within EPA, State environmental agencies, Federal Agencies and local governments. This work will be done by: 1) providing Lean facilitation expertise to plan and implement EPA, State, Federal, and local government administrative Lean activities/meetings/events and documentation support; and, 2) providing coaching support to EPA employees planning, facilitating and implementing Lean activities;

EPA and their stakeholders intend to use the approach to assist with the identification, design and implementation of new practices through facilitated events. The work includes providing process improvement facilitation expertise while building process improvement skills and documenting results.

Services will consist of the contractor:

- Conducting pre-event meetings to finalize the scope of the Lean event, identifying participants in designated Lean events/activities, identifying any necessary pre-work for Lean activities/events, and otherwise making preparations for the events to be optimally successful;

- Facilitating one (1) to three (3) Lean events ranging in length from one (1) to five (5) days. These events may range from a value stream mapping exercise to a full five (5) day Kaizen event (see description of "Kaizen event" under Task 3 of this SOW). The WAM will provide technical direction with specific subject and event information;

- Producing a draft report summarizing results of the events which may include: 1) a visual representation of the current state processes flow involved in each designated process, 2) a list of potential ways to streamline the designated process, 3) a

proposed future state map showing process flow for the designated process, and 4) an implementation plan to take advantage of proposed streamlining ideas;

Providing facilitation support for follow up meetings of stakeholders and participants;

Providing coaching support to EPA employees planning, facilitating and implementing lean activities/events; and

Providing report writing/editorial support for the resulting "Leaned" products and documents (e.g., National Program Manager Guidance overview and guidance).

These activities will focus on enhancing the process improvement skills, capabilities, techniques, strategies and processes used by EPA staff and managers, and their results.

The WA COR is authorized to provide technical direction under this work assignment.

Assumptions:

EPA will provide the locations/rooms(s) for all meetings/events in coordination with contractor schedule. Meeting participants will be invited by EPA to all meetings/events.

Experience for Facilitators:

At least three (3) years of experience with the Lean process (Lean government); preferably with an environmental agency (State or Federal) including the following:

- Lean concepts, tools and techniques;
- Scoping, planning, facilitating and/or leading projects using the Lean process; and
- Providing post-event support.

This work assignment does not duplicate tasks in any existing work assignments.

Quality Assurance (QA) Requirements:

Check [] Yes or [X] NO, if the following statement is true or false. The Contractor shall submit a written Quality Assurance Project Plan for any project that is developing environmental measurements or a Quality Assurance Supplement to the Quality Management Plan for any project which generates environmental data using models with their technical proposal

Tasks and Deliverables: The WA COR will review all deliverables in draft form and provide revisions and/or comments to the contractor. The contractor shall prepare the final deliverables incorporating the WA COR's comments.

Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

Task 1 - Prepare Workplan

The Contractor shall prepare a workplan within 15 calendar day of receipt of a work assignment signed by the Contracting Officer (CO). The workplan shall outline, describe and include the technical approach, resources, timeline and due dates for deliverables, and a detailed cost estimate by task and a staffing plan. The WA COR and the Contract Level COR and the CO will review the workplan. However, only the CO can approve/disapprove the workplan. The Contract Level COR is authorized to suggest revisions via email. If the Contract Level COR does request revisions, then the revisions shall be submitted as requested. ***The contractor shall prepare a revised workplan incorporating the CO's comments, if required.***

Deliverables and schedule under Task 1

- 1a. Workplan within 15 calendar days of receipt of work assignment.
- 1b. Revised workplan within three (3) calendar days of receipt of comments from the CO, if required.

Task 2 – Provide Planning Support for Agency Lean Events/Meetings – Including Pre-Work, Scoping Meetings

[Contract SOW Ref. – Element 4, page 13]

The Contractor shall lead pre-work and scoping meetings with the WA COR, team leader, appropriate senior managers, and event participants in each identified area. These pre-work and scoping meetings will result in identification of project scope, objectives, goals and required data compilation. The Contractor shall assist the Agency in selecting team members to participate in the Lean event. The Contractor shall assist in planning, developing agenda, handouts and other materials for the meeting, facilitating the meeting, and providing a summary report.

The Contractor shall have a kick-off meeting and coordinate with the WA COR, designated senior leaders and Lean team leader within five (5) calendar days of being informed of a potential Lean event topic to begin planning the scoping meetings and subsequent Lean events. This pre-work meeting will address preliminary project scope, potential format of the Lean event and desired outcomes for the Lean event; potential participants in scoping meeting and Lean event; possible meetings with managers or other individuals in preparation for scoping or Lean event; and other actions that would contribute to the success of this Lean effort. The WA COR will secure a date and facility for all meetings.

This shall include but is not limited to:

1. Pre-meetings, including a kick-off meeting within five (5) calendar days of being informed of a potential Lean event topics with appropriate senior leaders, Lean event team leader, WA COR, facilitator trainees, or others identified by the WA COR.
2. Conduct Lean scoping meetings that result in the identification of project scope, objectives, goals and data compilation. The Contractor shall assist the EPA team leader, the lead person responsible for the Lean event in an office or region, in

selecting appropriate individuals to participate in the Lean event and writing a short description of possible events.

Deliverables and schedule under Task 2

- 2a. Kick-off meeting held within five (5) calendar days of being formed of potential Lean event topic.
- 2d. Draft agenda and schedule for scoping meeting within 15 calendar business days of the scheduled scoping meeting.
- 2c. Scoping meetings that results in the identification of project scope, objectives, goals and data compilation shall be held within 45 calendar days of project kick-off meeting.
- 2e. The contractor shall provide a final summary report on the scoping meeting within five (5) calendar days of receipt of comments.

Task 3 – Provide Lean Event and Follow-Up Support

[Contract SOW Ref. – Element 4, page 13]

The Contractor shall facilitate the designate Lean event which could be a Value Stream Mapping event or a full Kaizen event. The Contractor shall assist in planning, developing, compiling and distributing agenda, handouts and other materials for the meeting; facilitating the meeting; providing a summary report; and providing follow-up meeting facilitation as deemed necessary for each event.

This shall include, but is not limited to:

- 1. Facilitate Lean event which shall take between one (1) and five (5) days.
- 2. Provide just-in-time Lean training to help acclimate EPA staff and stakeholders to Lean philosophy, tools and techniques.
- 3. Coach and mentor EPA Lean event Team Leader and facilitator trainees.
- 4. Serving in the capacity of Facilitator identify and manage change during the Lean meeting.
- 5. Work with EPA internal staff and management, as well as external stakeholders to develop a visual representation of the specified process flow.

Kaizen events shall also include, but not be limited to:

- 1. Identify sources of non-value added activities (waste) and prioritize future waste minimization, elimination, and improvement activities;
- 2. Establish a vision for the future, including development of a plan to achieve the vision;
- 3. Develop a continuous improvement process for the Team to use in periodic evaluation of improvement opportunities;
- 4. Participate by phone or in person in follow-up meetings to be held 30 calendar days, 60 calendar days and 90 calendar days after the Lean event;
- 5. Assist in planning, developing, compiling and distributing agenda, handouts, and other materials for meetings; facilitating the meetings; and
- 6. Provide a summary report.

Deliverables and schedule under Task 3

- 3a. Draft agenda for each event within 15 calendar days of the scheduled event.
- 3b. Draft Summary Report of each Lean event is to be completed within 15 calendar days of completion of the lean event.
- 3c. Final Summary Report of each Lean event five (5) calendar days after receipt of revisions from the WA COR, including presentations, current state and ideal state value stream maps and proposed action plan forward.
- 3d. Proposed agenda and schedule for follow-up meetings with 10 calendar days after initial Lean event, 30 calendar day meeting and 60 calendar day meeting.
- 3e. Draft update reports following each follow-up meeting within seven (7) calendar days of each event.
- 3f. Final summaries for each follow-up meeting within seven (7) calendar days of receipt of comments on draft from the WA COR.
- 3g. If technical direction is provided by the WA COR, the contractor shall proceed as directed.

Task 4— Provide Report and Editorial Support for Agency Lean Event Documents and Product Reports

[Contract SOW Ref. – Element 1, page 7 Reports]

The Contractor shall work with EPA internal staff and management to review and provide editorial support to EPA in the review of the draft documents that result from Lean efforts. The Contractors shall review the documents for their adherence to the EPA's Grammar, Style, and Usage Guide (<http://www.epa.gov/stylebook>) and review the program or regional office's format requirements preliminary discussions upon receiving initial drafts for edits. The Contractor shall assist in planning, developing the review process, compiling and distributing documents, handouts and other materials for review; providing a summary changes; and providing follow-up meeting facilitation for reconciliation of review and editorial issues.

This shall include, but is not limited to:

- 1. Assist program offices with document review and edits;
- 2. Provide red line strike-out mark ups for review; and
- 3. Serve, when requested, in the capacity of facilitator to manage changes and multiple revisions between program offices and other entities to produce documents for the lean efforts.

Deliverables and schedule under Task 4 (within three (3) calendar days of receipt of WA COR technical direction)

- 4a. Document edits in red line strike-out form for resulting Leaned process documents and products.
- 4b. Provide edits and other EPA Style Guide format and recommendations for Leaned process documents and products
- 4c. Revise Summary Report of documents, key changes and highlights of competing issues for discussion.

SUMMARY OF DELIVERABLES

Deliverables and schedule under Task 1

- 1a. Workplan within 15 calendar days of receipt of work assignment.
- 1b. Revised workplan within three (3) calendar days of receipt of comments from the CO, if required.

Deliverables and schedule under Task 2

- 2a. Kick-off meeting held within five (5) calendar days of being formed of potential Lean event topic.
- 2d. Draft agenda and schedule for scoping meeting within 15 calendar days of the scheduled scoping meeting.
- 2c. Scoping meetings that results in the identification of project scope, objectives, goals and data compilation shall be held within 45 calendar days of project kick-off meeting.
- 2e. The Contractor shall provide a Final Summary Report on the scoping meeting within five (5) calendar days of receipt of comments.

Deliverables and schedule under Task 3

- 3a. Draft agenda for each event within 15 calendar days of the scheduled event.
- 3b. Draft Summary Report of each Lean event is to be completed within 15 calendar days of completion of the Lean event.
- 3c. Final Summary Report of each Lean event five (5) calendar days after receipt of revisions from the WA COR, including presentations, current State and ideal State value stream maps and proposed action plan forward.
- 3d. Proposed agenda and schedule for follow-up meetings with 10 calendar days after initial Lean event, 30 calendar day meeting and 60 calendar day meeting.
- 3e. Draft update reports following each follow-up meeting within seven (7) calendar days of each event.
- 3f. Final summaries for each follow-up meeting within seven (7) calendar days of receipt of comments on draft from the WA COR.
- 3g. If technical direction is provided by the WA COR, the Contractor shall proceed as directed.

Deliverables and schedule under Task 4 (within three (3) days of receipt of WA COR technical direction)

- 4a. Document edits in red line strike-out form for resulting Leaned process documents and products.
- 4b. Provide edits and other EPA Style Guide format and recommendations for Leaned process documents and products
- 4c. Revise Summary Report of documents, key changes and highlights of competing issues for discussion.

EPAUnited States Environmental Protection Agency
Washington, DC 20460**Work Assignment**

Work Assignment Number

3 57

☐ Other ☐ Amendment Number:

Contract Number

EP W-10-002

Contract Period 11/19/2009 to 09/19/2014

Base

Option Period Number 3

Title of Work Assignment/SF Site Name

Supp for Lean Events for EPA

Contractor:

INDUSTRIAL ECONOMICS, INCORPORATED

Specify Section and paragraph of Contract: SOW

Element 4, Pg. 13

Purpose:

☐

Work Assignment:

☐

Work Assignment Close-Out

☐

Work Assignment Amendment

☐

Incremental Funding

☒

Work Plan Approval

Period of Performance

From 09/20/2012 To 09/19/2013

Comments:

The purpose of this action under Work Assignment (WA) 3-57 is to approve the contractor's work plan dated January 24, 2013 for a total level of effort hours of 322 and a estimated cost of (b)(4) fixed fee (b)(4) and ceiling of \$49,948.86.

☐

Superfund

Accounting and Appropriations Data

☒

Non-Superfund

SFO

(Max 2)

☐

Note: To report additional accounting and appropriations data use EPA Form 1900-89A

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

Authorized Work Assignment Ceiling

Contract Period

11/19/2009 To 09/19/2014

Cost/Fee:

LOE:

This Action

Total:

Work Plan / Cost Estimate Approvals

Contractor WP Dated: 01/24/2013

Cost/Fee: \$49,948.86

LOE: 322

Cumulative Approved:

Cost/Fee: \$49,948.86

LOE: 322

Work Assignment Manager Name Scott Bowles

Branch/Mail Code:

Phone Number: 202-566-2208

FAX Number:

(Signature)

(Date)

Project Officer Name Cheryl R. Brown

Branch/Mail Code:

Phone Number: 202-566-0940

FAX Number:

(Signature)

(Date)

Other Agency Official Name

Branch/Mail Code:

Phone Number:

FAX Number:

(Signature)

(Date)

Contracting Official Name Stefan Martinyan

Branch/Mail Code:

Phone Number: 202-564-1987

FAX Number:

(Signature)

(Date)

2/12/13

EPAUnited States Environmental Protection Agency
Washington, DC 20460**Work Assignment**

Work Assignment Number

3 57

☐ Other ☒ Amendment Number:

000001

Contract Number

EP-W-10-002

Contract Period 11/19/2009 To 09/19/2014

Base

Option Period Number 3

Title of Work Assignment/SF Site Name

Supp for Lean Events for EPA

Contractor

INDUSTRIAL ECONOMICS, INCORPORATED

Specify Section and paragraph of Contract SOW

Element 4, Pg. 13

Purpose:



Work Assignment



Work Assignment Close-Out



Work Assignment Amendment



Incremental Funding



Work Plan Approval

Period of Performance

From 09/20/2012 To 09/19/2013

Comments:

The purpose of this amendment to Work Assignment (WA) 3-57 is to reduce the WA level of effort by 82 hours from 322 to 240 hours and to delete Task 4 in the WA Statement of Work (SOW). The revised WA SOW is attached. The contractor shall submit a work plan and budget estimate in accordance with the contract.



Superfund

Accounting and Appropriations Data



Non-Superfund

SFO
(Max 2)

Note: To report additional accounting and appropriations data use EPA Form 1900 69A.

Line	DCN (Max 6)	Budget/Y (Max 4)	Appropriation Code (Max 5)	Budget Org/Code (Max 7)	Program Element (Max 5)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

Authorized Work Assignment Ceiling

Contract Period:

11/19/2009 To 09/19/2014

Cost/Fee:

LOE:

This Action:

Total:

Work Plan / Cost Estimate Approvals

Contractor WP Dated:

Cost/Fee:

LOE:

Cumulative Approved:

Cost/Fee:

LOE:

Work Assignment Manager Name Scott Bowles

(Signature)

(Date)

Branch/Mail Code:

Phone Number 202-566-2208

FAX Number:

Project Officer Name Cheryl R. Brown

(Signature)

(Date)

Branch/Mail Code:

Phone Number: 202-566-0940

FAX Number:

Other Agency Official Name

(Signature)

(Date)

Branch/Mail Code:

Phone Number:

FAX Number:

Contracting Official Name Stefan Martiyan

(Signature)

(Date)

Branch/Mail Code:

Phone Number: 202-564-1987

FAX Number:

**WORK ASSIGNMENT
Statement of Work (SOW)**

Title: Lean Event and Documentation Support

Contractor: IEC

Contract No.: EP-W-10-002

Work Assignment Number: 3-57

Estimated Period of Performance: Date of issuance to Nov. 19, 2013

Estimated Level of Effort: 322 – 82 = 240 hours

Key Environmental Protection Agency (EPA) Personnel:

Work Assignment Contracting Officer's Representative (WA COR):

Scott Bowles
Office of Policy/OSEM
202-566-2208

Contract Level COR:

Cheryl R. Brown
Office of Policy (1805T)
202/566-0940
202/566-3001 (fax)

Background and Purpose:

The Office of Strategic Environmental Management (OSEM) helps EPA and others make the strategic policy and governance changes necessary to meet the Agency's goals now and in the future through analysis of emerging issues and strategic management practices, including program analysis and program evaluation.

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The purpose of this work assignment is to support broader scale application of Administrative Lean and Lean Process Improvement tools and techniques, also known as "Lean Government", within EPA, State environmental agencies, Federal Agencies and local governments. This work will be done by: 1) providing Lean facilitation expertise to plan and implement EPA, State, Federal, and local government administrative Lean activities/meetings/events and documentation support; and, 2) providing coaching support to EPA employees planning, facilitating and implementing Lean activities;

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- Facilitating one (1) to three (3) Lean events ranging in length from one (1) to five (5) days. These events may range from a value stream mapping exercise to a full five (5) day Kaizen event (see description of "Kaizen event" under Task 3 of this SOW). The WAM will provide technical direction with specific subject and event information;

- Producing a draft report summarizing results of the events which may include: 1) a visual representation of the current state processes flow involved in each designated process, 2) a list of potential ways to streamline the designated process, 3) a

proposed future state map showing process flow for the designated process, and 4) an implementation plan to take advantage of proposed streamlining ideas;

Providing facilitation support for follow up meetings of stakeholders and participants;

Providing coaching support to EPA employees planning, facilitating and implementing lean activities/events; and

Providing report writing/editorial support for the resulting "Leaned" products and documents (e.g., National Program Manager Guidance overview and guidance).

These activities will focus on enhancing the process improvement skills, capabilities, techniques, strategies and processes used by EPA staff and managers, and their results.

The WA COR is authorized to provide technical direction under this work assignment.

The purpose of this amendment is to delete Task 4 from the work assignment.

Assumptions:

EPA will provide the locations/rooms(s) for all meetings/events in coordination with contractor schedule. Meeting participants will be invited by EPA to all meetings/events.

Experience for Facilitators:

At least three (3) years of experience with the Lean process (Lean government); preferably with an environmental agency (State or Federal) including the following:

- Lean concepts, tools and techniques;
- Scoping, planning, facilitating and/or leading projects using the Lean process; and
- Providing post-event support.

This work assignment does not duplicate tasks in any existing work assignments.

Quality Assurance (QA) Requirements:

Check ☐ Yes or ☒ NO, if the following statement is true or false. The Contractor shall submit a written Quality Assurance Project Plan for any project that is developing environmental measurements or a Quality Assurance Supplement to the Quality Management Plan for any project which generates environmental data using models with their technical proposal

Tasks and Deliverables: The WA COR will review all deliverables in draft form and provide revisions and/or comments to the contractor. The contractor shall prepare the final deliverables incorporating the WA COR's comments.

Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor

shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

Task 1 - Prepare Workplan

The Contractor shall prepare a workplan within 15 calendar day of receipt of a work assignment signed by the Contracting Officer (CO). The workplan shall outline, describe and include the technical approach, resources, timeline and due dates for deliverables, and a detailed cost estimate by task and a staffing plan. The WA COR and the Contract Level COR and the CO will review the workplan. However, only the CO can approve/disapprove the workplan. The Contract Level COR is authorized to suggest revisions via email. If the Contract Level COR does request revisions, then the revisions shall be submitted as requested. *The contractor shall prepare a revised workplan incorporating the CO's comments, if required.*

Deliverables and schedule under Task 1

- 1a. Workplan within 15 calendar days of receipt of work assignment.
- 1b. Revised workplan within three (3) calendar days of receipt of comments from the CO, if required.

Task 2 – Provide Planning Support for Agency Lean Events/Meetings – Including Pre-Work, Scoping Meetings **COMPLETED**

[Contract SOW Ref. – Element 4, page 13]

The Contractor shall lead pre-work and scoping meetings with the WA COR, team leader, appropriate senior managers, and event participants in each identified area. These pre-work and scoping meetings will result in identification of project scope, objectives, goals and required data compilation. The Contractor shall assist the Agency in selecting team members to participate in the Lean event. The Contractor shall assist in planning, developing agenda, handouts and other materials for the meeting, facilitating the meeting, and providing a summary report.

The Contractor shall have a kick-off meeting and coordinate with the WA COR, designated senior leaders and Lean team leader within five (5) calendar days of being informed of a potential Lean event topic to begin planning the scoping meetings and subsequent Lean events. This pre-work meeting will address preliminary project scope, potential format of the Lean event and desired outcomes for the Lean event; potential participants in scoping meeting and Lean event; possible meetings with managers or other individuals in preparation for scoping or Lean event; and other actions that would contribute to the success of this Lean effort. The WA COR will secure a date and facility for all meetings.

This shall include but is not limited to:

1. Pre-meetings, including a kick-off meeting within five (5) calendar days of being informed of a potential Lean event topics with appropriate senior leaders, Lean event team leader, WA COR, facilitator trainees, or others identified by the WA COR.

2. Conduct Lean scoping meetings that result in the identification of project scope, objectives, goals and data compilation. The Contractor shall assist the EPA team leader, the lead person responsible for the Lean event in an office or region, in selecting appropriate individuals to participate in the Lean event and writing a short description of possible events.

Deliverables and schedule under Task 2

- 2a. Kick-off meeting held within five (5) calendar days of being formed of potential Lean event topic.
- 2d. Draft agenda and schedule for scoping meeting within 15 calendar business days of the scheduled scoping meeting.
- 2c. Scoping meetings that results in the identification of project scope, objectives, goals and data compilation shall be held within 45 calendar days of project kick-off meeting.
- 2e. The contractor shall provide a final summary report on the scoping meeting within five (5) calendar days of receipt of comments.

Task 3 – Provide Lean Event and Follow-Up Support **COMPLETED**

[Contract SOW Ref. – Element 4, page 13]

The Contractor shall facilitate the designate Lean event which could be a Value Stream Mapping event or a full Kaizen event. The Contractor shall assist in planning, developing, compiling and distributing agenda, handouts and other materials for the meeting; facilitating the meeting; providing a summary report; and providing follow-up meeting facilitation as deemed necessary for each event.

This shall include, but is not limited to:

1. Facilitate Lean event which shall take between one (1) and five (5) days.
2. Provide just-in-time Lean training to help acclimate EPA staff and stakeholders to Lean philosophy, tools and techniques.
3. Coach and mentor EPA Lean event Team Leader and facilitator trainees.
4. Serving in the capacity of Facilitator identify and manage change during the Lean meeting.
5. Work with EPA internal staff and management, as well as external stakeholders to develop a visual representation of the specified process flow.

Kaizen events shall also include, but not be limited to:

1. Identify sources of non-value added activities (waste) and prioritize future waste minimization, elimination, and improvement activities;
2. Establish a vision for the future, including development of a plan to achieve the vision;
3. Develop a continuous improvement process for the Team to use in periodic evaluation of improvement opportunities;
4. Participate by phone or in person in follow-up meetings to be held 30 calendar days, 60 calendar days and 90 calendar days after the Lean event;
5. Assist in planning, developing, compiling and distributing agenda, handouts, and

- other materials for meetings; facilitating the meetings; and
6. Provide a summary report.

Deliverables and schedule under Task 3

- 3a. Draft agenda for each event within 15 calendar days of the scheduled event.
- 3b. Draft Summary Report of each Lean event is to be completed within 15 calendar days of completion of the lean event.
- 3c. Final Summary Report of each Lean event five (5) calendar days after receipt of revisions from the WA COR, including presentations, current state and ideal state value stream maps and proposed action plan forward.
- 3d. Proposed agenda and schedule for follow-up meetings with 10 calendar days after initial Lean event, 30 calendar day meeting and 60 calendar day meeting.
- 3e. Draft update reports following each follow-up meeting within seven (7) calendar days of each event.
- 3f. Final summaries for each follow-up meeting within seven (7) calendar days of receipt of comments on draft from the WA COR.
- 3g. If technical direction is provided by the WA COR, the contractor shall proceed as directed.

Task 4— Provide Report and Editorial Support for Agency Lean Event Documents and Product Reports

TASK CANCELLED -

[Contract SOW Ref. – Element 1, page 7 Reports]

~~The Contractor shall work with EPA internal staff and management to review and provide editorial support to EPA in the review of the draft documents that result from Lean efforts. The Contractors shall review the documents for their adherence to the EPA's Grammar, Style, and Usage Guide (<http://www.epa.gov/stylebook>) and review the program or regional office's format requirements preliminary discussions upon receiving initial drafts for edits. The Contractor shall assist in planning, developing the review process, compiling and distributing documents, handouts and other materials for review; providing a summary changes; and providing follow-up meeting facilitation for reconciliation of review and editorial issues.~~

~~This shall include, but is not limited to:~~

- ~~1. Assist program offices with document review and edits;~~
- ~~2. Provide red line strike-out mark ups for review; and~~
- ~~3. Serve, when requested, in the capacity of facilitator to manage changes and multiple revisions between program offices and other entities to produce documents for the lean efforts.~~

~~**Deliverables and schedule under Task 4 (within three (3) calendar days of receipt of WA COR technical direction)**~~

- ~~4a. Document edits in red line strike-out form for resulting Leaned process documents and products.~~
- ~~4b. Provide edits and other EPA Style Guide format and recommendations for Leaned process documents and products~~
- ~~4c. Revise Summary Report of documents, key changes and highlights of competing issues for discussion.~~

SUMMARY OF DELIVERABLES

Deliverables and schedule under Task 1 -

- 1a. Workplan within 15 calendar days of receipt of work assignment.
- 1b. Revised workplan within three (3) calendar days of receipt of comments from the CO, if required.

Deliverables and schedule under Task 2—COMPLETED

- 2a. Kick-off meeting held within five (5) calendar days of being formed of potential Lean event topic.
- 2d. Draft agenda and schedule for scoping meeting within 15 calendar days of the scheduled scoping meeting.
- 2c. Scoping meetings that results in the identification of project scope, objectives, goals and data compilation shall be held within 45 calendar days of project kick-off meeting.
- 2e. The Contractor shall provide a Final Summary Report on the scoping meeting within five (5) calendar days of receipt of comments.

Deliverables and schedule under Task 3 - COMPLETED

- 3a. Draft agenda for each event within 15 calendar days of the scheduled event.
- 3b. Draft Summary Report of each Lean event is to be completed within 15 calendar days of completion of the Lean event.
- 3c. Final Summary Report of each Lean event five (5) calendar days after receipt of revisions from the WA COR, including presentations, current State and ideal State value stream maps and proposed action plan forward.
- 3d. Proposed agenda and schedule for follow-up meetings with 10 calendar days after initial Lean event, 30 calendar day meeting and 60 calendar day meeting.
- 3e. Draft update reports following each follow-up meeting within seven (7) calendar days of each event.
- 3f. Final summaries for each follow-up meeting within seven (7) calendar days of receipt of comments on draft from the WA COR.
- 3g. If technical direction is provided by the WA COR, the Contractor shall proceed as directed.

CANCELLED

Deliverables and schedule under Task 4 (within three (3) days of receipt of WA COR technical direction)

- ~~4a. Document edits in red line strike-out form for resulting Leaned process documents and products.~~

- ~~4b. Provide edits and other EPA Style Guide format and recommendations for Leaned process documents and products~~
- ~~4c. Revise Summary Report of documents, key changes and highlights of competing issues for discussion.~~

EPAUnited States Environmental Protection Agency
Washington, DC 20460**Work Assignment**

Work Assignment Number

3-57

☐ Other ☒ Amendment Number:

000001

Contract Number

EP-W-10-C02

Contract Period 11/19/2009 To 09/19/2014

Base

Option Period Number 3

Title of Work Assignment/SF Site Name

Supp for Lean Events for EPA

Contractor

INDUSTRIAL ECONOMICS, INCORPORATED

Specify Section and paragraph of Contract SOW

Element 4, Pg.13

Purpose:



Work Assignment



Work Assignment Close Out



Work Assignment Amendment



Incremental Funding



Work Plan Approval

Period of Performance

From 09/20/2012 To 09/19/2013

Comments:

The purpose of this action under Work Assignment 3-57 is to approve the contractor's work plan and budget estimate dated March 26, 2013 for a decrease of 93 hours level of effort, a decrease of (b)(4) in estimated cost, and a decrease of (b)(4) in fixed fee for a total decrease of \$8,280.51.



Superfund

Accounting and Appropriations Data



Non-Superfund

SFO
(Max 2)

Note: To report additional accounting and appropriations data use EPA Form 1900-69A.

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

Authorized Work Assignment Ceiling

Contract Period:	Cost/Fee:	LOE:
11/19/2009 To 09/19/2014	\$49,948.86	322
This Action:	-\$8,280.51	93
Total:	\$41,668.35	229

Work Plan / Cost Estimate Approvals

Contractor WP Dated:	Cost/Fee:	LOE:
03/26/2013	\$8,280.51	93
Cumulative Approved:	Cost/Fee:	LOE:
	\$41,668.35	229

Work Assignment Manager Name Scott Bowles

Branch/Mail Code:

Phone Number 202-566-2208

FAX Number:

(Signature)

(Date)

Project Officer Name Cheryl R. Brown

Branch/Mail Code:

Phone Number 202-566-0940

FAX Number:

(Signature)

(Date)

Other Agency Official Name

Branch/Mail Code:

Phone Number:

FAX Number:

(Signature)

(Date)

Contracting Official Name Stefan Martiyan

Branch/Mail Code:

Phone Number 202-566-1987

FAX Number:

(Signature)

(Date) 4/3/13